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CONCEPTUAL BASIS OF FORMING A STRATEGIC PLANNING AS AN ELEMENT OF ECONOMY' STATE MANAGEMENT SYSTEM

The article deal with a conceptual basis of forming strategic planning in the system of state economy management at its different hierarchical levels taking into account needs and challenges caused by time. The scientist's views regarding understanding such categories as strategy, planning and strategic planning are examined and author's approach to them in the context of this study are proposed. Some relationship between categories "strategy" and "concept", and at the same time their absolute difference is marked. Two main criteria (time and purpose) that cause mull and inexactness in categorical-conceptual apparatus of strategic planning in the system of state economy management are considered. Author point main advantages of using strategic planning at the mesolevel and group them from different state management positions.

Keywords: strategy, planning, strategic planning, state management, socio-economic development, socio-economic systems of mesolevel.

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КОНЦЕПТУАЛЬНІ ОСНОВИ СТАНОВЛЕННЯ СТРАТЕГІЧНОГО ПЛАНУВАННЯ ЯК ЕЛЕМЕНТУ СИСТЕМИ ДЕРЖАВНОГО РЕГУЛЮВАННЯ ЕКОНОМІКИ

У статті розглядаються концептуальні основи становлення стратегічного планування в системі державного регулювання економіки на різних ієрархічних рівнях управління з огляду на потреби та зміни, обумовлені часом. Досліджено погляди науковців відносно розуміння сутності категорій стратегія, планування, стратегічне планування та представлено авторський підхід щодо

Statement of a problem in a general view. Effective management of socio-economic processes, which take place in national economy at different hierarchical management levels (both at national – macrolevel and local – mesolevel), seems impossible without strategic planning, realization of which is carried out by public authorities of the appropriate level which play the role of a powerful organization in the country by practicing and implementing the society development strategy. In quickly environment development because of rapid development of the technology, global and regional organization of production and increased competition for resources and investments strategic planning considers as a management tool that helps to improve the reactive efficiency of power governance structures to global changes and to adapt the policy of national economy's development to such changeable conditions. In addition, as a kind of dialogue instrument between authorities and representatives of other economy sectors it contributes forming the conceptual views and developing a harmonious socio-economic development vision in the conditions of optimisation using the available resources.

The analysis of resources and publications of last years. Many scientific papers examine theoretical and methodological aspects of the strategic planning. Among them there are fundamental studies of the classics (I. Ansoff, K. Endrus, M. Porter, A. Thompson, A. Chandler and others, from their works, in fact, originates the classical theory of strategic planning and strategic management, in view of this, they are called “strategic planning parents”. There are also works of foreign researchers (W. Trousdale, L. Ramirez, G. Kebede, T. Yskova and others) and domestic scientists (for example such as: O. Berdanova, V. Vakulenko, V. Tertychka, H. Kuharska, C. Bila). However, despite the large number of scientific publications related strategic planning, there is a need to research some principles of forming strategic planning as an element of economy' state management system given the fact that at national and regional level it came from corporate management.

The idea of the article. The study will focus on conceptual basis of forming strategic planning in the system of state economy management at different hierarchical levels, taking into account needs and challenges caused by time. It will also look over main advantages of using strategic planning at the mesolevel from different positions.

The material of the study. Science and practice bases on a quite

extensive category-conceptual apparatus when they concentrate on a particular problem question. There are situations when the same categories describe different situations; on the other hand, the same processes in terms of their content describe by different categories. Considering this, at the beginning of this paper it is necessary to make an excursus into the history of such concepts as “strategy”, “planning” and “strategic planning”, and to explore the scientist’s views regarding their understanding. The result of such study should be some conclusion about the nature of basic categories of current research and about processes that they describe.

The term “strategy” originates from the Greek language: “stratos” – army, “ago” – to lead. Initially it means the art or the science to be a commander. In a figurative sense, it means the leading art of public and political struggle. The concept of “strategy” was included to managerial terms in the 50-ies of XX century. The scientist’ views to the category from the economic point synthesis, in general, to its representation as a general, comprehensive plan of achieving the company’s or more complex socio-economic systems’ (areas of macro- and mesolevel) goal.

The category of “strategy” has quite deep roots and quite wide spreading. In general, as scientists note [1, p. 6], three approaches to the category vision developed during a quite long period of its existence:

- according to the first approach, when you talk about strategy, you mean an abstract norm of activity directed to the process of goals’ achieving. In this case category approaches the category of “strategic vision” that is it understood as an idea about the desired state;

- according to the second approach, the strategy is identified with a strategic plan of actions; in this respect, the emphasis shifts to software component;

- and finally, the strategy is considered as a process “addressed to determine the development direction of organisations, regions or territorial communities in changing environment” [2, p. 4].

Understanding strategy as a plan of actions is dominant nowadays. However, modern experts and consultants in strategic development are increasingly paying attention to a strategy as some coordinated way. Such their vision can be explained like this: the external conditions becomes more dynamic so planning for the long term is not excuse themselves because it’s necessary to make many changes in it. Instead, using a coordinated long-term vision allows more flexibly react to changes and

maintain a clear course of development. In the context of this study (i.e., in the system of economy state management at mesolevel), under the strategy we will mean the complex of actions towards organizing the economic entities activities on the way of achieving the strategic goal of complex social-economic systems' development, which outline in dialogue process between public authorities, business and community based on evaluation and current situation analysis, and which is reflected in the development plan of mesosystem.

It is also necessary to note some relationship between such categories as "strategy" and "concept" and, at the same time, to mark their absolute difference. The "concept" (from Latin "conceptio" – understanding) is a system of views on certain phenomena, processes, or it is the way of certain phenomena understanding, events or their interpretation, or it is the main idea in a certain kind of human activity [3, p. 28]. From such definitions, it is clear that the category of "strategy" is wider than the category of "concept". The first one details the plan in a specific form of human activity. In the context of this paper, it details the public authorities' purpose concerning improving social and economic situation, increasing the level and quality of life and defines the ways of its achieving. Thus, these categories are connected each other, but one of them is up another: strategy complements and concretizes the concept. Therefore, the concept is the primary document in the process of strategic planning; strategies develop on their basis. As scientists notes, a "conceptual positions becomes more well-founded and problem issues becomes more coordinated" in strategies [1, p.13].

The category of planning, as history shows, have aroused many centuries ago and relates the fundamental person quality to form in advance a certain image of the object or its actions' environment, that is, to predict and to plan future economic situation, state of society or different institutions. By definition of U.S. researchers M. Dunok and H. Dimok, "planning is a setting goals and then finding out actions that should be done, as well as who, when and in with way, for which funds should act to achieve the desired goal" [4, p. 131].

According to experts' views in the field of macroeconomic planning, "people rulers planned and predicted in ancient times", but stable relations in this sphere and branched categorical apparatus, which we use today, was formed in times of market-capitalist relations. The methods of

long-term and operational production planning at enterprise improved at that time; it becomes a solid base for forming institute of forecasting, programming and planning of socio-economic development in society.

A significant contribution to the total experience in planning practice belongs to the twentieth century centralized planning practice of Soviet Union and others socialist countries. The researchers of planning theoretical-methodological foundations argue that the Soviet Union was the first country in the world, where the basic idea of K. Marx doctrine about the possibility of national economy management with plan put into practice [5, p. 200]. As a result, the majority success of intensive development the Soviet economy is associated with the planning. Those theoretical and methodological foundations of planning, which were created by Soviet scientists-economists, and practical USSR experience became the basis for developments in the macroeconomic planning and forecasting in foreign countries, where, since the crisis of the 30-ies, plans became the main element of the economy' state regulation system.

Nowadays planning occupies a special place in the system of socio-economic processes management, in regulation the directions and dynamics of these processes and in ensuring the normal functioning of economic structures. A number of forecast, program and planning documents, which are being developed in different countries of the world at national, sectoral, intersectoral and regional levels, are recognized by scientists as one of the most important instruments of the certain management subjects policy in view of their ability to organize a clear and well-grounded work of economic entities in order to achieve those tasks that facing government, business and society. The desire to achieve some changes in the economic and social sphere towards economic and social development, namely: strengthening economic activity, providing economic systems restructuring and social problems solution (such as employment, social infrastructure development, socio-economic crises elimination, creation conditions for ecological safety and others), makes public authorities to use planning. Thus, they try to predict future or to predict long-term trends in social, economic, ecological, innovative development, to identify long-term priorities and to select and substantiate achieving defined goals measures.

Under the category of “planning”, in the context of this paper, we will mean substantiation the objectives and priorities of socio-economic development, identification ways and tools of their achievement by

comparative assessment of alternative options and acceptance the most probable of them in expected terms. Such approach to the category indicates that planning is a core of the management system; it is a process, by means of which socio-economic system adapts the available resources to changes that can happen in its internal or external environment.

A lot of attention in scientific literature is paid to the category of “strategic planning”, which appears as a symbiosis of such two categories as “strategy” and “planning”. Scientists views are ambiguous about when it appears for the first time: some scientists say, that it appears in 60-ies [6, p. 8], others – in 70-ies of the XX century [7, p. 28]. There are also scientists who have chosen a universal approach: they note the period of category appearance as 50-70-ies of XX century. There is a point of view according to which at the end of the 50's and early 60-ies of XX century in the USA and most countries of Western Europe (countries in which this scientific direction was originated) falls strategic planning “boom”. Despite the differences in time, there is no doubt among scientists that this research area, since it's becoming, concerned businesses (companies and corporations) and only over the time it integrated to more complex socio-economic systems, such as the national economy, regional economy and urban economy.

The definition of the “strategic planning” category is ambiguous, although it is connected with the attempt of researches to reflect their own views concerning category essence and to display period of time and environment changes under the influence of which this definition, in fact, was formed. In general, strategic planning is the process of recognition the goals of socio-economic structures and their changes, as well as resources required for their achievement and policy, which is aimed for collection and using of these resources [8, p. 74]. Such definition has formed because of generalization of large corporations' strategic planning experience. There is a little brief definition of the category, according to which “strategic planning is a systematic process by which company, region or local community plan and forecast their activities for the future” [1, p. 10].

The ideas of strategic planning at mesolevel (in regions, districts, cities,), which were formed by management theoreticians of the commercial structures, were used abroad in the last two decades of the XX century [9, p. 61] as an attempt of government to determine long-term trends of economic development. The main ideas of the new, at that time, approaches

to management of regions and cities was associated with territories vision as independent active economic entities that are able to identify strategic goals and operational objectives and ready to concentrate available resources on achieving them with minimizing the risks. In other words, the basis of such approach to management of complex socio-economic systems of mesolevel was an idea of transferring business ideas and methods of strategic planning to the authority's level. In this context, a separate territory was considered as kind of enterprise, which served consumers (citizens, local and foreign business), and had relationships with other areas. Accordingly, along with so-called "industrial strategic planning" there was another one – the "territorial strategic planning" used at the level of cities, districts, regions, countries and their associations. The place of spontaneous territories development occupies strategic planning; strategies are associated with the lighthouse, which indicates the fastest development path of complex social and economic systems.

The urgency of using strategic planning at mesolevel can explain by following reasons:

First, strategic planning is an element of management system that recognizing by world practice, which allows creating some conditions and using territory' potential for its future development.

Second, taking into account the necessity to adapt the system to market economy requirements and to open competitive market, strategic planning helps to make current decisions based on strategic goals of system development.

Third, strategic planning is a tool that is able to combine the efforts of government on the one hand, and the efforts of baseness and community, on the other one, in solving systems problems. Thus, the relationships between the government, business and community became stronger and the image of the territory increase.

The main advantages of using strategic planning in socio-economic systems of mesolevel presented in table 1.

As you can see from table 1, in general, strategic planning helps decision-makers to select appropriate goals that steer towards collective vision for the future and create through participation and partnership with citizens and stakeholders. Authorities encourage the building of a vision of the future in which strategic planning not only responds to the needs of the people, but enables close collaboration with all stakeholders, neighbouring

local governments and national and international partners. However, it is necessary to note, that development strategies of socio-economic systems are a means, not the end in itself; they are a tool for development, even if their success measures through tangible results.

Table 1

Advantages of territories' strategic planning
(Made by the author from materials 10, p. 18)

Main areas	Advantages
Governance and cooperation	<ul style="list-style-type: none"> –it can help government establish performance-based management that creates sustainable economies and social capital; –it can identify more clearly the challenges facing community and respond to those challenges more directly and more effectively; –it can provide more coherence and better communications between administrative structures to coordinate public actions through multi-level governance; –it is a tool for change management that helps to prioritise and improves institutional responses and local decision-making.
Mobilization of stakeholders and consensus	<ul style="list-style-type: none"> –it supports and structures dialogue between stakeholders, e.g., private sector and community, and can help to develop consensus-based solutions; –it provides new perspectives and opportunities for social inclusion; –it can provide continuity between local administrations, so that plans are not abandoned once different councillors come to power, thereby creating stability for citizens.
Develop innovative and sustainable concepts	<ul style="list-style-type: none"> –it recognizes tangible and intangible cultural assets that add value to the quality of life; –it builds opportunities on emerging trends and creative potential; –it places environmental issues as a priority for the sustainable development of the territory; –it can be a platform to develop concepts and new models of housing, energy and mobility; –it provides flexible instruments for government to rapidly respond to natural disasters.
Implementation	<ul style="list-style-type: none"> –it makes it easier to balance fewer resources with the demand from more people; –it generates a broader understanding of responsibilities; –it provides certainty for the long-term investments of citizens and private enterprises.

At the end of the paper, we want to talk about some criteria that allow scientists to use the category of “strategic planning”, so there is mull and inexactness in categorical-conceptual apparatus. Those criteria are time and purpose.

First of all (concerning time criteria), planning which is expected for 10 or more years because of its duration, which in literature is called

strategic planning, is not always so in its contents. As it noted by T. Uskova, duration as one of the main characteristic of strategic plans “does not make plan strategical” [5, p. 226]. The main difference between strategic planning and long-term planning is a future interpretation. Long-term planning envisages that the future can predict through extrapolating existing tendencies of growth. In this case, the authorities guide by the fact that the results necessarily will be better in future, and this idea takes as a basis in reasoning the area development strategy. The result of such planning practice is planning optimistic figures of socio-economic development and getting real results that are often substantially lower than planned ones. Strategic planning does not involve that future must be better. It focuses on analysis of the territorial development prospects, and the main task of such analyse is ascertainment the dangers, opportunities and individual emergencies that can change today’s trends [11, p. 15].

Second (concerning purpose), it necessary to note the difference between strategic planning of territories’ socio- economical development from strategic spatial planning of territory’ development. They often mixed, when talking about territories development planning on prospect. The result of the first process is socio-economic development strategy for certain territory which aimed at creating a favourable environment for business development, attracting investments, providing population social needs and improving living standards. The result of another one is the system of spatial planning documents of the territory, so-called urban planning documentation (general urban plans, detailed area plans, etc.). Spatial planning is narrower for strategic. In the context of spatial planning the main goal of complex development of territories is productive forces development on the basis of balanced consideration of social, environmental and economic factors; forming economic complex on the basis of coherent development of the main and additional industries of regional importance, transport, utilities and social infrastructure. In the context of strategic planning the main goal of complex development of territories is achieving the main goal of management - improving the level and life quality of population in a certain area.

Undoubtedly, the processes of strategic socio-economic planning and spatial planning are interrelated. About their relationship, we will give the following statement: “it is impossible to develop good regional or municipal development strategies without a clear territorial restrictions

vision, on the other hand, documents of territorial development are worth nothing without a strategic vision, prospects and development goals understanding” [12, p. 8].

Conclusions. Thus, the strategic planning of socio-economical development of complex socio-economic systems in the public administration of the national economy is a system process by which the public authorities of the appropriate level of economy management define the objectives, priorities and main tasks of socio-economic development of a certain territory for the future in the conditions of dynamic environment: form the mechanism of their implementation, evaluation and monitoring. Public authorities began using strategic planning at a certain stage of its historical development, when the competition for resources has adopted a global scale, as well as resources in the field of strategic management on the level of corporations became an essential achievement of science and wide practice. Scientific and methodological principles of corporate strategic management have become the methodological basis for the development of strategic planning at the level of complex socio-economic economic system such as regions, sub regions, cities, agglomerations, districts and villages.

Strategic planning helps decision-makers to select appropriate goals that steer towards collective vision for the future, and create through participation and partnership with citizens and stakeholders. Strategic planning differs from, for example, urban planning, and it complements other planning tools and usually results in a planning product such as a territory development Strategy. Strategies are flexible tools for long-term orientation and enable revision and adaptation to changing circumstances.

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STIMULATION OF INNOVATIVE DEVELOPMENT OF ENTERPRISES BASED ON RESTRUCTURING CHANGES

The relevance of the research of theoretical and practical foundations of the industrial enterprises' restructuring is substantiated in the article. The need to intensify the development of innovative enterprises to improve their competitiveness and efficiency of their activities is analyzed. The essence of the concept of "enterprise restructuring" as a factor enhancing innovative changes is considered. Conclusions about the feasibility of restructuring in order to achieve sustainable development of the enterprise through the introduction of advanced technologies, growth the share of knowledge-based competitive innovative products and